

REGIONAL PLANNING AND COORDINATION GUIDELINES

Regional Planning and Coordination Goals:

- ◆ To build relationships with and among the legal services delivery stakeholders in each community throughout the state to ensure that client needs are appropriately identified and addressed, and that the delivery system is as efficient and responsive to those needs as is reasonably practicable.
- ◆ To establish and maintain ongoing process for communication and collaboration with clients, the community, and equal justice partners in each region and sub-region of the state to share information regarding program needs and service capacities, identify client needs and client service capacity gaps, survey available resources, and discuss what might be done to address the spectrum of needs identified.
- ◆ To gain a greater understanding of the respective roles of the providers in the regional delivery system, their resources and priorities, their institutional commitments, as well as their relative capacities to address specific client population legal needs, including cultural, language, disability, and other barriers impacting client access to legal services.
- ◆ To develop a strategic and collaborative plan containing specific advocacy initiatives, strategies, and assigned responsibilities for addressing identified client needs (including strategies to fill identified service capacity gaps) and as a guide for collaboration with respect to advocacy initiatives, strategies and assigned responsibilities.
- ◆ To continue bar, bench, community and client involvement over time so that the plan and other collaborative efforts and mechanisms can be periodically evaluated and modified as necessary.
- ◆ To assess and evaluate identified strategies and allocation of resources to ensure that services are effectively targeted to client identified needs.

Creating an Effective Foundation:

- ◆ Develop a clear statement of values that underlie the planning and coordination process.
- ◆ Articulate the principles that will guide the planning process and ongoing coordination.

- ◆ Identify the interests, institutional commitments, resources and service delivery capacities that motivate each potential and actual participant in the planning and coordination process
- ◆ Identify the relevant planning and coordination partners within region/sub-region
- ◆ Identify inter-relationships of planning process among sub-regions within larger geographic regions
- ◆ Specify and agree upon planning participants for given set or subset of goals.
- ◆ Obtain commitment from all participants to the planning and coordination process.
- ◆ Establish and maintain realistic time commitments to process and establish efficient schedule.

Information Gathering and Sharing:

- ◆ Identify data regarding low income client base within region, including underserved or hidden populations
- ◆ Identify existing resources and services providers addressing client needs
- ◆ Identify gaps in existing resources and services need providers
- ◆ Identify any changing trends in client service needs and service limitations
- ◆ Record and hold participants accountable to commitments to tasks related to information gathering and sharing.

Assess Current Allocation of Resources:

- ◆ Realistically assess and communicate current allocation of resources to client needs.
- ◆ Commit to potential reallocation of staff resources to address identified client needs.
- ◆ Prioritize among client needs for service delivery.
- ◆ Evaluate varying strategies and capacities for addressing client service delivery needs.

Prepare or Revise Regional/Coordination Plan

- ◆ Identify the geographic area or sub-area of planning focus

- ◆ List of active planning partners (organizations and contact persons)
- ◆ Brief narrative overview of the planning process
- ◆ Describe the socio-demographic information and client needs assessment
- ◆ Discuss existing service delivery capacities in relationship to identified client needs
- ◆ Identify capacity gaps that need to be developed to address client needs.
- ◆ Identify strategies within the substantive areas of planning focus, including any list of areas of need that the planners have singled out for primary initial efforts.
- ◆ Allocate tasks and responsibilities including time lines and progress benchmarks
- ◆ Describe process for evaluation of strategies identified, including how and when evaluation will occur.